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LATE NEWS

The Polish Government has ordered 3 meatless days a week in order to reduce the number of cattle and pigs being slaughtered by restaurants and butcher shops and to aid in an increase in livestock numbers. Poultry of all kinds may continue to be served on the 3 meatless days but pork, veal, lamb, and beef may not be served or sold on those days.

Poland has been advised by Russia that seeds will be provided for spring planting. The amounts are 33,000 short tons of wheat, 16,500 tons of oats, and an unspecified quantity of rye. Shipments were reported as already arriving by the broad-gauge railway line via Prezemysl.

Switzerland is rationing almost all foods except vegetables, according to a despatch from former President Hoover. Swiss supplies of cereals and fats are smaller than at any time during the past 6 years. Even with further cuts in the ration, some imports of grain will be needed before the new crop is available next October. Thus far, Swiss rations have been adequate to maintain prewar health standards primarily because of the availability of milk for children and of small quantities for adults. Management of the food program is excellent and there is very little black marketing.

Supplies of cereals in sight in Czechoslovakia will last only until about the middle of May, according to a despatch from former President Hoover. New crop supplies will not be available until mid-August. The bread ration for the period beginning in April was reduced from 290 to 225 grams per capita daily. Indigenous supplies of fats are sufficient to maintain less than two-thirds of the authorized ration of 490 grams per capita monthly. Sugar supplies are adequate to meet the ration of 1,450 grams per capita monthly. In fact, small quantities of sugar would have been available for export except for the shortage of cereals.

In the Union of South Africa, 1945-46 flue-cured tobacco production is estimated by the Tobacco Control Board at about 6.8 million pounds. In addition, about 27 million pounds of air-cured leaf and 500,000 pounds of Turkish are expected to be harvested during the 1945-46 season. Reliable sources state, however, that the Board's estimates may be overly optimistic, since weather conditions during the latter part of the growing season were unfavorable. Total tobacco production in the Union during 1944-45 amounted to 24 million pounds.

Sweden is placing at the disposal of starving countries 75,000 barrels of salted fish and 3,850 short tons of peas, according to a recent announcement of the Swedish Supply Minister. All feeding of grain to livestock has been stopped and a reduction in egg production is expected. The Swedish press on April 8 announced the reintroduction of rationing for spaghetti, biscuits, etc., in view of the tight supply situation for bread grains.

This section is continued on page 224.

WORLD CORN CROP SMALLEST SINCE 1941

The 1945-46 world corn production is now estimated at about 5,050 million bushels, a decline of about 4 percent from the 1944-45 crop, but about 7 percent larger than the 1935-1939 average. North America and Europe showed substantial reductions compared with the preceding crop, and the European production was also considerably below average. A small decrease is indicated for Africa. South America's crop, which is now being harvested, is estimated to be about 30 percent larger than the poor crop harvested a year ago, though considerably smaller than average. Production in Soviet Russia and Asia, was indicated to be slightly larger than in 1944 yet somewhat smaller than average. Increases in those areas, however, were not large enough to offset losses in North America and Europe.

Sharply reduced crops have increased the import needs of corn for food considerably during the current season, especially in Mexico, Cuba, Italy, the Balkan countries, and the Union of South Africa, where corn is a staple item of food. Though the bulk of the corn trade in prewar years was for feed purposes, the supply available for export in 1945-46 will not be adequate to meet the more urgent uses for food.

The United States and Argentina are normally the principal corn exporting countries. Available supplies for export from the United States are expected to be very limited, at least until the 1946-47 season. The 1945 crop in the United States was not only smaller than the preceding harvest, but the quality of the crop was poor, with much of it having a very high moisture content. Heavy domestic demands for feed and industrial uses further curtail the quantity available for export.

The very small corn crop harvested in Argentina in the spring of 1945, together with extensive use of carry-over stocks from previous harvests for fuel, resulted in greatly reduced supplies in that country. The present supply position precludes any large exports until the new crop becomes available in May-June of this year, when resumption of the export movement may be expected.

Yields Smaller Than A Year Ago

Lower yields were principally responsible for the decline in world production from 1944. While smaller acreage was also a factor in some important producing areas, notably in the United States, increases in other areas, especially in South America, were largely compensating and the net loss in the world total was small. Most of the increase in South America was estimated for Argentina. Plantings in Europe were slightly larger, mainly as a result of a considerable increase reported for Hungary. Acreage in Asia, Africa, and Oceania did not change significantly, according to present estimates.

The world production estimate has been reduced by about 225 million bushels since the time of its previous publication. The principal reduction was in the Argentine estimate which is now placed at 200 million

CORN: Acreage, yield per acre, and production in specified areas, averages 1935-1939, annual 1943-1945 a/

Continent and country	Acreage b/				Yield per acre	Production			
	Average 1935-1939	1943	1944	1945 preliminary	Average 1935-1939	Average 1935-1939	1943	1944	1945 preliminary
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
North and Central America:									
United States	92,699	94,455	97,078	91,202	25.0	2,315,539	3,034,354	3,203,310	3,018,410
Canada	172	230	270	237	40.8	7,010	7,775	11,700	10,365
Mexico	7,501	7,532	8,650	(8,200)	9.0	67,523	69,886	96,077	(75,000)
Guatemala	594	-	-	-	15.7	9,338	-	-	-
El Salvador	288	350	(340)	(325)	17.9	5,155	7,576	(5,000)	-
Honduras	c/ 206	325	-	-	c/18.0	3,717	4,785	-	-
Cuba	(360)	(400)	(400)	(300)	16.7	(6,000)	(7,000)	6,250	5,089
Nicaragua	c/ 86	110	(150)	(110)	c/ 6.7	c/ 578	(2,750)	(2,200)	(2,000)
Estimated total d/	102,450	105,300	109,200	102,500	-	2,423,200	3,165,000	3,360,000	3,150,000
Europe:									
Italy	3,639	3,435	3,132	3,230	31.3	113,881	66,122	85,685	59,052
Spain	c/ 1,094	919	(930)	1,112	c/28.4	c/ 31,076	23,187	23,149	(17,700)
Portugal	997	1,154	1,150	914	12.9	12,851	14,212	14,358	12,204
France	839	e/ 556	e/ 494	(556)	26.9	22,559	e/ 7,677	e/ 8,858	(6,300)
Greece	650	-	-	531	15.5	10,078	-	-	(6,300)
Germany	(92)	-	-	-	(57.9)	(5,330)	-	-	-
Austria	(165)	173	-	-	(40.0)	(6,603)	5,512	-	-
Czechoslovakia	c/ 419	-	-	-	c/28.2	c/ 11,807	-	-	-
Poland	c/ 224	-	-	-	c/20.2	c/ 4,535	-	-	-
Bulgaria f/	1,733	1,954	1,860	1,718	18.0	31,173	20,710	29,807	13,232
Hungary	2,925	-	2,511	3,254	31.5	92,007	-	88,184	80,286
Rumania	12,611	-	-	-	16.8	211,890	-	-	-
Yugoslavia	6,573	-	-	5,780	26.8	176,061	-	-	136,400
Albania	235	(200)	(200)	205	21.6	5,067	(3,935)	(3,900)	(3,200)
Estimated total d/	32,200	30,170	26,660	27,200	-	735,000	610,000	580,000	485,000
Soviet Union	7,041	-	-	-	-	-	-	-	-

Asia:									
Turkey	1,098	1,549	1,428	(1,642)	20.9	22,971	34,418	20,011	(14,000)
India	6,449	7,140	7,230	7,170	12.9	83,368	100,600	97,080	98,000
Burma	217	-	-	-	7.6	1,640	-	-	-
Indochina	1,019	-	-	-	20.8	21,168	-	-	-
China	c/11,580	-	-	-	c/23.5	c/ 272,513	-	-	-
Manchuria	3,720	-	-	-	23.3	86,586	-	-	-
Kwantung	c/ 229	-	-	-	c/21.5	c/ 4,929	-	-	-
Japan	c/ 128	-	-	-	c/23.6	c/ 3,017	-	-	-
Chosen	c/ 321	-	-	-	c/13.0	c/ 4,177	-	-	-
Java and Madura	5,150	-	-	-	15.5	79,976	-	-	-
Philippine Islands	1,718	-	-	-	9.4	16,129	-	-	-
Estimated total d/	31,720	35,540	-	-	-	598,000	632,000	-	-
Africa:									
Union of South Africa	g/ 5,909	g/(7,000)	-	-	-	80,997	86,928	(64,000)	(55,000)
Angola	c/ 1,427	-	-	-	c/ 9.2	c/ 13,084	-	-	-
Belgian Congo	(200)	-	-	-	(25.0)	(5,000)	-	-	-
Southern Rhodesia g/	268	257	-	-	22.1	5,923	5,714	-	-
Basutoland	350	-	-	-	8.1	2,822	-	-	-
Madagascar	263	111	198	222	15.9	4,189	1,575	2,362	2,559
Kenya g/	c/ 108	(86)	-	-	c/31.0	c/ 3,350	1,436	3,047	-
Egypt	1,599	2,025	1,962	1,945	39.5	63,229	54,210	61,370	66,496
French Morocco	1,112	1,507	(1,250)	1,223	7.6	8,505	11,023	4,724	1,505
French West Africa	c/ 1,732	-	-	-	c/12.4	c/ 21,473	-	-	-
Estimated total d/	18,500	20,200	19,960	19,940	-	260,000	255,000	235,000	230,000
South America:									
Argentina	10,775	9,144	5,077	(9,000)	28.0	301,986	343,681	116,745	(200,000)
Brazil	10,025	(10,000)	-	-	21.5	215,161	223,310	199,713	(220,000)
Uruguay	531	586	411	(550)	9.8	5,188	9,136	2,751	(4,000)
Chile	110	131	(125)	(125)	22.7	2,496	2,797	-	-
Colombia	c/ 1,374	-	-	-	c/11.1	c/ 15,276	25,594	-	-
Estimated total d/	24,460	23,310	18,260	23,180	-	566,000	636,000	368,000	480,000
Oceania:									
Australia	314	283	257	(300)	22.4	7,030	7,432	6,398	(7,500)
New Zealand	7	6	8	5	45.4	318	296	443	300
Estimated world total d/	216,690	220,000	215,200	214,700	-	4,721,000	5,380,000	5,240,000	5,050,000

Compiled from official sources and the International Institute of Agriculture, where available; otherwise Office of Foreign Agricultural Relations estimates (shown in parentheses) based on foreign service reports and other information.

a/ Years shown refer to year of harvest. Harvests of the Northern Hemisphere countries are combined with those of the Southern Hemisphere which follow; thus, the crop harvested in the Northern Hemisphere in 1945 is combined with the Southern Hemisphere crop being harvested in the spring of 1946. b/ Figures refer to harvested areas as far as possible.

c/ Average of less than 5 years. d/ Estimated totals include allowances for missing data for countries shown and for other producing countries not shown. e/ Official estimate adjusted to include Alsace Lorraine. f/ Estimates for 1943 to date take account of boundary change and are therefore, not strictly comparable with earlier years. g/ European cultivation only.

bushels. Unfavorable weather conditions since earlier season reports have reduced unofficial forecasts by about 100 million bushels. The North American total has been reduced by about 45 million bushels, most of the change being accounted for by revisions in the United States estimate. The estimated European total has been lowered by about 35 million bushels, a large part of the change occurring in the estimates for the Balkans.

North America. Corn production in the United States in recent years has exceeded the estimated production for all other countries combined, amounting to about 60 percent of the estimated world total. Since per acre yields in the United States are above average, however, the acreage represents a smaller percentage of the total, averaging about 43 percent of the estimated world acreage. The reduction in the United States crop, compared with 1944, was due to a decrease in acreage, amounting to about 6 percent, since the average yield for the country was virtually unchanged from last year's average.

North and Central America. The corn crop is also smaller than in 1944 in other parts of North America and in Central America. Reduced crops in these areas are attributed principally to the effects of drought on the main corn crop. The crop in Mexico is estimated at about 75 million bushels, compared with 96 million bushels a year ago. Production, at the figure reported, would be smaller than estimated requirements. Present estimates for Cuba are more favorable than earlier season forecasts, but the crop is still indicated as below average. Corn's importance as a food in these countries creates import needs, with the lower level of production this year.

Europe. Corn production in Europe is estimated to be about 16 percent smaller than in 1944 and about 34 percent below average. The four Danube Basin countries, Hungary, Yugoslavia, Rumania, and Bulgaria ordinarily produce about 75 percent of the continental total. In all of these countries the estimated production for 1945 was considerably below average, and also less than the 1944 outturn, except in Yugoslavia where the corn crop was estimated to be slightly above the 1944 level. Many European countries reported larger corn plantings in 1945, especially in areas where fall seeding of small grains had been curtailed by unfavorable weather conditions. Plantings in Hungary and Rumania were indicated to be somewhat larger than in 1944, while the corn acreage in Bulgaria and Yugoslavia was reported to be slightly smaller than a year earlier.

A shortage of seed grain in some areas is reported to have contributed to increased corn plantings. Smaller seed requirements for corn are believed to have influenced some shift from small grains to corn. A prolonged spring and summer drought, however, reduced yields in many areas, especially in Rumania and Italy. In Italy, production was reduced to almost half an average crop. No surplus is expected to be available from the normally surplus producing countries of the Danube Basin.

Soviet Union. In Soviet Russia some increase is indicated for acreage and production of corn in 1945, compared with the 2 preceding years, though both were estimated to be smaller than the 1935-1939 average.

No allowance has been made for European areas that have been annexed by Soviet Russia, and boundaries are as of 1937 for this as well as other countries having changed frontiers. The Russian estimates would be larger and the European totals correspondingly smaller if the crop for the territories involved were shifted. Of the annexed territory, Bessarabia and Northern Bukovina normally produced about 40 million bushels of corn in prewar years.

Asia - Africa. Corn production in Asia was estimated to be at about prewar levels in both 1944 and 1945. Acreage, on the other hand, was indicated to be somewhat larger than average for both years. In Africa corn production was estimated to be slightly smaller than in 1944 and somewhat below average. Smaller average yields per acre appear to account for the reduction, since the acreage was placed at a higher figure than average. The principal reduction is for the Union of South Africa where growing conditions have not been favorable, and a considerably below-average crop is expected. (The corn harvest begins in April.)

South America. The corn harvest now beginning in South America is expected to be well above the very small 1944 crop but considerably less than the 1935-1939 average production. Lacking an official estimate, the crop in Argentina is carried at 200 million bushels, about 85 million bushels larger than the very small 1944 production but about 100 million bushels below the average. Trade estimates of the crop range from 200 to 240 million bushels. Yields are expected to be below average, as a result of some unfavorable weather and locust damage. Prospects for the Brazilian crop are promising, and one of the best crops of recent years is expected.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report the Committee was composed of Joseph A. Becker, chairman, Judith E. Downey, C. M. Purves, Lois B. Bacon, Kathryn H. Wylie, and Robert J. Manovill.

WORLD APPLE CROP SHARPLY DECREASED

Apple production in important producing countries is estimated at 349 million bushels in the 1945-46 season, compared with 610 million bushels in 1944-45 and the 1935-1939 average of 519 million bushels. Early spring frost in both North America and Europe was the principal cause of the small crop produced in 1945-46, although summer drought and a deficiency of fertilizer and spray material were contributing factors in Europe. Despite the small crop in 1945-46, world apple production was well maintained and in some instances increased during the war period. Given good growing conditions and an improvement in the supply of fertilizers, insecticides, and fungicides, a relatively large world output of apples can be expected in 1946-47.

APPLES: Production in specified countries, average 1935-1939, annual 1941-1945

Continent and country	Average 1935-1939	1941	1942	1943	1944	1945 a/
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
North America						
United States ...	127,311	122,585	128,700	89,050	124,754	64,400
Canada	13,650	10,055	12,171	12,171	16,715	7,205
Mexico	1,231	2,021	1,729	1,769	1,790	1,286
Total	142,192	134,661	142,600	102,905	143,259	72,891
Europe						
Austria	b/15,140	(10,638)	(7,300)	(9,550)	(10,400)	(8,700)
Belgium	(1,200)	c/	c/	c/	c/	8,000
Bulgaria	b/ 1,064	2,798	3,301	(3,300)	(3,300)	3,209
Czechoslovakia ..	b/ 9,034	4,605	6,111	4,061	5,094	2,642
Denmark..........	b/ 1,182	5,971	3,588	5,626	5,282	(4,534)
Estonia	1,563	(1,530)	(1,160)	(1,820)	(1,710)	(1,470)
Finland	b/ 1,023	(1,460)	(905)	(1,875)	(1,120)	(1,075)
France						
Dessert and cooking	10,499	3,096	6,790	8,211	18,958	6,991
Cider	153,973	14,825	74,428	38,196	212,900	(89,000)
Germany	52,647	36,743	(25,151)	(33,000)	(36,000)	(30,000)
Greece	374	(400)	(300)	(500)	(350)	446
Hungary	b/ 2,313	c/	c/	c/	c/	690
Italy	13,107	16,337	11,083	20,274	14,701	13,743
Luxemburg						
Dessert and cooking	193	120	250	300	710	260
Cider	93	20	110	60	310	130
Netherlands	b/ 3,820	(1,300)	(2,900)	(3,500)	(8,100)	(3,000)
Norway	1,080	(1,120)	(850)	(1,330)	(1,250)	(350)
Rumania	b/31,983	c/	c/	c/	c/	c/
Spain	b/ 5,411	5,739	(5,000)	(6,000)	(6,000)	(3,600)
Sweden	(2,000)	(2,075)	1,572	2,473	(2,300)	(2,000)
Switzerland	16,452	21,127	16,994	29,854	32,150	(16,000)
Turkey	5,139	(5,000)	(3,500)	(6,500)	(4,800)	(3,800)
United Kingdom						
Dessert and cooking	10,597	7,607	17,519	15,279	15,675	(12,500)
Cider	3,427	1,479	2,749	3,645	6,146	(3,500)
Yugoslavia	6,913	c/	c/	c/	c/	c/
Total (excluding cider)	192,734	172,266	160,764	196,303	211,730	145,711
Total	350,227	188,590	238,051	238,204	431,086	238,341

APPLES: Production in specified countries,
average 1935-1939, annual 1941-1945, continued

Continent and country	Average 1935-1939	1941	1942	1943	1944	1945 a/
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
Other countries						
Argentina	1,286	3,904	6,632	5,746	7,771	6,990
Chile	b/ 940	596	367	550	550	(600)
South Africa	(950)	1,400	1,000	1,000	729	833
Korea	3,220	5,166	c/	c/	c/	c/
Japan	7,624	9,304	c/	c/	c/	c/
Palestine	65	112	161	152	(150)	(150)
Australia	9,131	9,214	8,620	12,710	7,649	(10,000)
New Zealand	2,961	1,890	2,344	2,609	2,300	2,250
Total	26,177	31,586	34,324	38,567	35,549	37,823
World total (excluding cider)	361,103	338,513	337,688	337,775	390,538	256,425
World total	518,596	354,837	414,975	379,676	609,894	349,055

Compiled from official sources. Figures in parentheses are estimates of the Office of Foreign Agricultural Relations. The harvests of Northern Hemisphere countries are for the year shown and are combined with the harvest in Southern Hemisphere countries of the following year.
a/ Preliminary. b/ Partly estimated. c/ Included in total.

North America produced one of the smallest apple crops in 1945 in over two decades. The United States and Canada experienced an early spring which advanced the blooming period by several weeks, but a killing frost severely damaged the prospect. Consequently, production in North America totaled only 73 million bushels, compared with 143 million in 1944 and 142 million bushels, the prewar (1935-1939) average. Early prospects in 1946 are favorable if a frost does not occur, but again the season is almost as far advanced as in 1945.

In Europe, apple production in 1945 is estimated at 238 million bushels, compared with 431 million bushels in 1944, and the prewar (1935-1939) average of 350 million. A May frost, which severely damaged fruit crops in 1945, occurred over much of western Europe. Then a severe drought during the summer months together with a deficiency of fertilizers and pesticides in many countries further reduced the output. Only the United Kingdom, Belgium, Luxembourg, Greece, Italy, Finland, and Sweden, had crops equal to or better than the prewar average, and in these areas the larger output was due to increased bearing acreage. All of the other important producing countries had apple crops smaller than the prewar average, and nearly all of Europe had crops substantially below the relatively large harvests of 1944. With the possible exception of central

Europe, where severe winterkilling occurred in 1941-42, the acreage in apple orchards has been fairly well maintained, but the general health of trees is not good because of a general deficiency of fertilizers and pesticides. Given good growing weather, however, the acreage can produce an apple crop considerably larger than the average output in the prewar years, but the quality of the fruit is expected to be inferior for some time to come.

In the remainder of the world, apple production totaled 38 million bushels in the 1945-46 season, compared with 36 million bushels in 1944-45 and 26 million, the prewar (1935-1939) average. In Japan and Korea apple production apparently continued to expand during the war years. In Australia, New Zealand, and the Union of South Africa there was little change during this period, but in Argentina, production increased substantially, reaching a peak of 7.8 million bushels in 1944-45.

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COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS, AND FEEDS

RECORD RICE SURPLUS FORECAST IN BRAZIL

The exportable surplus of rice from Brazil during 1946 is estimated at 350 to 450 million pounds, compared with previous record exports of 330 million in 1944. These export supplies will be available following the harvest which takes place largely from March to May. Exportation of the maximum surplus depends on the availability of transportation from interior Brazil to consuming centers along the coast and to ports for shipment, and on whether or not domestic rice prices continue higher than export prices in some areas.

The Brazilian acreage, which increased steadily during the war, was larger again this year, and weather conditions have been favorable for good yields in most areas. As a result of plentiful rainfall in Rio Grande do Sul, production estimates vary from 26.9 to 29.4 million bushels (790 to 860 million pounds milled), compared with 24.1 million bushels (700 million pounds) harvested 2 years ago. This State usually accounts for 85 to 95 percent of Brazil's rice exports, with the quantity available for export above domestic needs depending on the volume shipped to other areas in Brazil. Shipments to other States increased in the last 3 years, those in 1945 amounting to about 215 million pounds (see Foreign Crops and Markets, March 6, 1946).

In Sao Paulo, acreage was increased 30 percent and latest reports indicated a good outturn. Another large harvest in that State may make possible an additional supply for consuming centers on the coast if transportation is improved, thus permitting rice from southern areas to be exported to foreign countries. A carry-over from last year's Sao Paulo crop into 1946, exceeding 100 million pounds, was reported available at Santos for export at the beginning of the year. The Sao Paulo domestic prices, however, were higher than the agreement export price, a factor which discouraged exports.

Dry weather in some parts of Minas Geraes, the third major rice-producing State, may have adversely affected the crop. Most of the production in that State is consumed domestically, with small shipments sent to neighboring areas.

The Brazilian rice surplus from the 1946 crop, excluding 22 million pounds for Latin American countries, is contracted for purchase by the United Kingdom and the United States, in accordance with the agreement of December 1943. In 1945, rice prices f.o.b. were raised 10 percent to $5.88 per 100 pounds for "Agulha" and "Japan" and to $6.08 for "Blue Rose," and the allowable percentage of broken rice was increased from 10 percent to 20 percent.

FATS AND OILS

SUNFLOWER-SEED CROP CUT SHARPLY IN CHILE

Chilean sunflower-seed production for 1945-46 amounts to 37 million pounds, according to the first official estimate. This represents a decrease of 40 percent from last year's record output of 62 million pounds. Despite the large harvest of 1944-45, returns to the grower were so low that plantings for 1945-46 decreased 25 percent. This marks the first drop in acreage in over 6 years as well as the first set-back in the Government's efforts to make the country self-sufficient in vegetable oil. Unfavorable weather during a considerable part of the growing season brought about a decrease in yield per acre.

As a result of this year's reduction in the domestic supply of sunflower seed, Chile's principal source of vegetable oil, the country will be required to rely more heavily on imports of oilseeds than during the past 2 years, in order to meet local requirements for edible oil.

INDIAN PEANUT CROP SMALLER THAN AVERAGE

India's 1945-46 peanut crop, harvested in November-December, was placed at 3,487,000 short tons from 9,848,000 acres, compared with 4,319,000 tons from 9,841,000 acres last year, according to the latest available estimates. Though acreage is the largest on record the harvest indicates a drop of 19 percent from 1944-45 and 7 percent from the 5-year (1940-1944) average. Below normal yield was probably due to unfavorable weather conditions during the growing season. Some districts including Madras, where 40 percent of the peanut acreage is located, suffered from inadequate rain, but in sections of Bombay, where approximately 24 percent of the total acreage is planted, continuous rains checked the growth of the crop.

INDIA: Peanut area, yield, and production,
1945 with comparisons

Year	Area	Yield per acre	Production
	1,000 acres	Pounds	1,000 short tons
Average 1935-1939	7,535	875	3,296
1940	8,770	946	4,146
1941	7,070	819	2,896
1942	7,697	832	3,201
1943	9,808	873	4,282
1944	9,841	878	a/ 4,319
1945 b/	9,848	708	3,487

Compiled from official sources.
a/ Revised. b/ Subject to revision.

COTTON AND OTHER FIBERS

MEXICAN HENEQUEN PLANTINGS LARGE

New henequen plantings in Yucatan, Mexico, during 1945 were reported equal to about 6.45 percent of the present area of production plantings, or enough to keep output at approximately the current high level. Yucatan includes about 95 percent of the country's total acreage. The producing life-span of henequen plants ranges from 10 to 20 years, but in Mexico it averages nearly 14 years for profitable fiber production. Annual replacement of over-age plants should equal about 7 percent of the producing area in order to keep output at a constant level, granted favorable conditions generally. The 1945 plantings can normally be expected to yield a small harvest about 1952, and then to increase each year until about 1955 when mature production should begin.

Acreage has shown an upward trend from 1931, when an area of slightly over 200,000 acres was reported, to the present time, when acreage exceeds 340,000 acres. Prices received by producers were very low from about 1930 to 1934, but since then have been more favorable, especially after 1939. The unit price in 1943 was more than four times that of 1931 and 1932. Fiber sold to the United States under contract since 1942 has brought a constant price of 8-1/2 to 9-1/8 cents per pound, according to quality, f.o.b. United States port of entry.

There has been a strong demand for Mexican henequen during the war years. Enemy occupation of the Philippines and the Netherlands East Indies cut the world supply of cordage fibers approximately in half at a time when greater supplies of rope were needed. Acreage were increased, but because of the long time required for the plants to mature, production has lagged in comparison with planted acreage.

The low point in Mexican production was in 1938 when less than 177 million pounds of fiber were delivered. The preliminary estimate of 1945 production in the State of Yucatan is approximately 223 million pounds, compared with about 263 million during the preceding year. Production in 1945 was cut considerably by drought from April through June, but the year closed on a high level of output comparable with the corresponding months of 1944. Conditions at the beginning of 1946 appear to be favorable for another large crop.

MEXICO: Area and production of henequen,
1944 with comparisons

Year	Area	Production
	1,000 acres	1,000 pounds
Average -		
1925-1929	294	291,990
1930-1934	233	238,030
1935-1939	234	204,010
1940-1944	304	257,580
1938	238	176,510
1940	268	212,170
1942	315	248,760
1944	340	312,170

Compiled from official sources.

Purchase contracts between the United States Commerical Company and Mexican producers expire at the end of May 1946, but demand continues great because of the extreme shortage in Europe of binder twine and cordage of many types. South America also furnishes a market for henequen fiber and manufacturers.

Manufacturing of henequen products increased considerably during the past several years, reaching a peak of 68 million pounds in 1944, compared with about 2 million in 1930. Estimates for 1945 indicate an increase of 10 to 12 percent over exports in the preceding year. Yucatan now has more than 40 mills of various sizes producing henequen twine, rope, binder twine, and other products. Before the war binder twine was the most important product, but in the period 1942-1945 rope and light cordage accounted for about 53 percent of total manufactures and binder twine about 35 percent. The bulk of both commodities was shipped to the United States.

Mexican consumption of henequen and its products is small compared with production. During the past 20 years apparent consumption has averaged about 21 million pounds, or less than 9 percent of average annual production during the same period.

WEEKLY COTTON PRICES ON FOREIGN MARKETS

COTTON: Prices of certain foreign growths and qualities in specified markets

Market location, kind, and quality	Date 1946	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria (spot)		Kantar			
Ashmouni, F.G.F.	4-4	99.05 lbs.	Tallari	32.00	26.72
Giza 7, F.G.F.	4-4	99.05 lbs.	Tallari	36.75	30.68
Karnak, F.G.F.	4-4	99.05 lbs.	Tallari	35.50	29.64
Bombay (May futures)		Candy			
Jarila	4-5	784 lbs.	Rupee	443.00	17.02
Bombay (spot)		Candy			
Kampala, East African	4-5	784 lbs.	Rupee	850.00	32.66
Buenos Aires (spot)		Metric ton			
Type B	4-6	2204.6 lbs.	Peso	1620.00	21.88
Lima (spot)		Sp.quintal			
Tanguis, Type 5	4-6	101.4 lbs.	Sol	127.00	19.27
Recife (spot) a/		Arroba			
Mata, Type 5	4-5	33.07 lbs.	Cruzeiro	89.00	14.44
Sertao, Type 5	4-5	33.07 lbs.	Cruzeiro	95.00	15.41
Sao Paulo (spot) a/		Arroba			
Sao Paulo, Type 5	4-5	33.07 lbs.	Cruzeiro	119.50	19.38
Torreon (spot)		Sp.quintal			
Middling, 15/16"	4-5	101.4 lbs.	Peso	98.75	20.04

Compiled from weekly cables from representatives abroad.
a/ The five quotations for March (in terms of U. S. cents) have been revised downward by 0.25 cent because of a change in Brazilian exchange regulations made effective March 1, 1946.

TOBACCO

SWISS TOBACCO IMPORTS NEARLY EQUAL PREWAR

Imports of leaf tobacco into Switzerland during September-December 1945 totaled 6.9 million pounds, of which about 2.7 million originated in the United States. For all of 1945, Swiss imports of leaf amounted to 15.2 million pounds, of which 5.5 million were from the United States. Other principal suppliers were Turkey, Brazil, and the Dominican Republic. In prewar (1935-1939) years, imports of leaf into Switzerland averaged 15.8 million pounds annually. During that period, imports from the United States, principally dark fire-cured and Maryland leaf, averaged 6.2 million pounds.

In 1945, Switzerland imported about 23,000 pounds of cigars, 52,000 pounds of cigarettes, and 4,000 pounds of smoking tobacco. Practically all of the imported cigarettes were of United States manufacture. Reports indicate that demand for American cigarettes far exceeds the available supplies. Priority in shipping space for such vital goods as wheat, feedstuffs, and coal is reported to be hampering trade in tobacco products.

DOMINICAN REPUBLIC TOBACCO CROP LARGE

The 1945-46 crop of tobacco in the Dominican Republic is estimated at about 50 million pounds from 38,000 acres, compared with an outturn of 37 million pounds in 1944-45. The large 1945-46 production is attributed to heavy demands for export at favorable prices to growers. First pickings from the current crop are reported to be of good quality, and growers anticipate that the established minimum of 7 cents per pound may be exceeded.

In 1945, the Republic exported about 20.4 million pounds of leaf tobacco, principally destined to France, Belgium, Spanish Morocco, Algeria, the Canary Islands, and Switzerland. During the prewar (1935-1939) period, exports of leaf from the Republic averaged 13.7 million pounds annually. The 1945 exports were the largest since 1934, when shipments totaled 21.4 million pounds.

LIVESTOCK AND ANIMAL PRODUCTS

NEW ZEALAND BUTTER, EGG OUTPUT DROPS

February output of butter in New Zealand fell 34 percent and cheese 9 percent below that for the same month last year, as indicated by gradings for export. Lack of sufficient rainfall to maintain pastures during the summer months was the direct cause of the decrease in February and also in the 2 preceding months. While rains have fallen, they came too late to affect production materially.

Butter output for the first 7 months of the present grading season was 9 percent below that in the same period a year ago, and cheese production dropped 4 percent.

NEW ZEALAND WOOL CLIP MAY DROP; EXPORTS UP

As the season advances, it is reported that the average weight of wool sheared per sheep in New Zealand is less than last season when wool production reached the all-time record total of 372 million pounds (grease wool basis). It now appears that production this season (1945-46) may be slightly less than the preliminary estimate of 370 million pounds as published in Foreign Crops and Markets, December 3, 1945.

In the Gisborne-Hawkes Bay district of North Island the wool clip may be as much as 12 percent below 1944-45, according to latest reports. This district supports around 20 percent of the total number of sheep in New Zealand. December, the beginning of summer in the Southern Hemisphere, was the coldest month on record.

Exports for the first 3 months (July 1-September 30) of this season amounted to 45 million pounds, an increase of 36 percent, compared with the same months of 1944-45. Out of this total 21 million pounds went to the United States, 19 million to the United Kingdom, and 6 million to Canada, whereas in the same period last year the United Kingdom took 25 million pounds out of a total 33 million pounds exported.

Wartime exports from New Zealand were considerably below prewar. The annual average for the six seasons (1939-40 to 1944-45) was 209 million pounds, against a prewar average of 293 million pounds. The United States has never been an important importer of New Zealand wool. However, imports into this country increased to 45 million pounds in 1944-45, compared with an average of 17 million in the seasons 1935-36 to 1938-39. The United Kingdom continued to be the chief destination of this wool during wartime. Canada increased imports of New Zealand wool during the war, the average for the war years being 2 million pounds, compared with a prewar average of 11 million. During the war some New Zealand wool also went to India and the Soviet Union, which was a new development. The bulk of the wool is 46's (low 1/4 blood) or coarser.

The Wool Disposal Act, which became effective January 1, 1946, approves the agreement made between the United Kingdom, Australia, New Zealand, and the Union of South Africa for disposal of the wartime accumulation along with the current wool clip, and provides for the carrying out of the Joint Disposals Plan on the part of New Zealand through the New Zealand Wool Disposal Commission. Carry-over in New Zealand was estimated at 370 million pounds, actual weight, as of June 30, 1945, by the Joint Disposals Organization. Table accompanying this article appears on page 223.

INDIA RELAXES EXPORT CURBS

The Indian Department of Commerce has decided to decontrol exports of grey and black wools, according to a recent cable. These wools, which constitute about 15 percent of the total clip, were not exported during the war but were reserved for the Indian industry.

White and yellow wools may henceforth be exported by anyone, the "established exporters" principal being abolished. For every 3 bales of white and yellow wool exported, however, 2 bales must be offered to one of the purchasing agents of the Industries and Supplies Department of the Government of India so that adequate supplies of raw wool will be available to local woolen manufacturers.

NEW ZEALAND: Wool exports, seasons - July-June
1944-45, with comparisons

Country of destination	Average 1935-36 to 1938-39	1939-40 a/	1940-41	1941-42	1942-43	1943-44	1944-45
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
United States	17	14	3	14	15	27	45
Canada	11	8	29	43	6	27	13
Japan	21	8	-	-	-	-	-
Australia	13	15	4	1	1	1	1
India	-	b/	16	11	14	4	7
Others	-	3	-	-	-	-	-
Total non-European	62	48	52	69	90	59	66
United Kingdom	171	155	145	111	92	185	57
Soviet Union	-	-	-	25	23	-	-
Continental Europe	49	74	2	-	-	-	-
Total Europe including the Soviet Union	220	229	147	136	115	185	57
Unspecified	11	b/	-	-	-	-	-
Total all countries	293	277	199	205	209	244	123

Compiled from Wool Intelligence Notes, New Zealand Marketing Board Reports and cabled reports.

a/ Calendar year 1939. Exports for season 1939-40 by countries not available.

b/ Less than 500,000 pounds.

LATE NEWS (con't)

The food situation in Poland is very unsatisfactory, according to a despatch from former President Hoover. The disrupting effects of war are more serious there than in any country thus far visited. Movement of displaced persons into and out of the country is very large. Food collection and the rationing program are very inadequate. Cereal requirements are especially urgent because of the short potato crop last year. The bread ration is being reduced from 300 to 225 grams per capita daily, but imports of about 88,000 short tons per month would be required during May, June, July, and August to maintain even this reduced ration. Imports of 37,400 short tons of fats will be required during 1946 in order to maintain the low fat ration of 250 grams per capita monthly. There is a distinct possibility that a considerable quantity of grain obtained for spring seeding will be eaten because of the critical status of grain supplies.

Finland will need imports of both cereals and fats in order to maintain current rations until the new cereal crop is available about October 15, according to a despatch from former President Hoover. The bread ration is 300 grams per capita daily, including peas and rice as well as wheat, rye, barley, and oatmeal. The fats ration is 500 grams per capita monthly. The effects of these very limited rations are showing up, particularly among children. Finland is most adversely affected by a shortage of milk, normally a very important item in the diet.

The grinding season for Surinam's sugar cane ended late in March and the crop will provide just about enough sugar to meet local requirements without too drastic rationing.

Italy will be brought to famine if wheat stocks are not replenished within a month, according to a statement by the Italian delegate to the European food conference which opened in London on April 3. Italy has now only 209,000 short tons of wheat, he stated, which will last for barely 3 weeks. It will be impossible to maintain the present ration unless immediate relief is given, he concluded.

Southern Rhodesia's 1945-46 flue-cured tobacco crop is placed at about 40 million pounds from 79,400 acres, according to recent estimates. In 1944-45, the country produced 46.8 million pounds of flue-cured tobacco. Production of fire-cured leaf in 1945-46 is estimated at about 500,000 pounds. No figure is available as yet regarding the size of the 1945-46 outturn of Turkish leaf.

Uruguay is confronted with an impending food crisis. Usually producing sufficient for its own requirements and often an exporter of wheat, the country has experienced two consecutively bad harvests, the results of which are expected to leave Uruguay during the coming year with an estimated deficit of 143,000 short tons of wheat. Stocks on hand, at the present rate of consumption, are expected to last no longer than July. and, for that reason, unless additional supplies can be obtained from Argentina, rationing of flour and bread are almost certain. Other products also in short supply are sugar and salt and difficulties often are being experienced in obtaining meat, eggs, butter, and poultry.